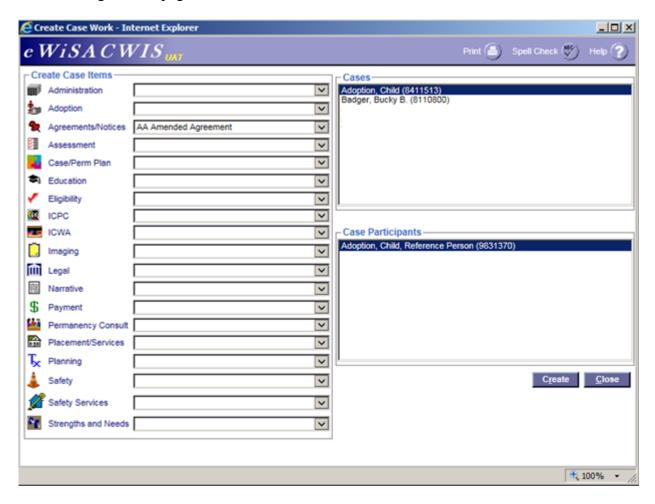
## **Adoption Assistance Amended Agreement**

Note: In order to create an Adoption Assistance Amended Agreement, an assignment to the case is needed.

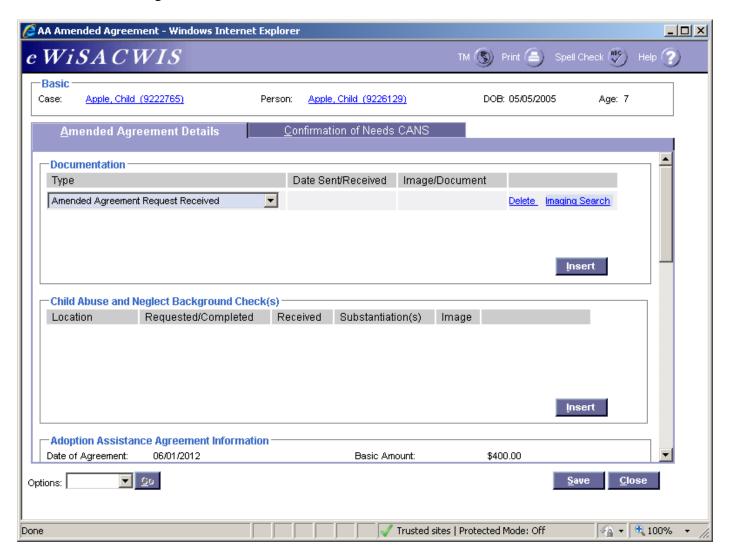
## Creating an AA Amended Agreement

- 1. From the desktop, go up to Create > Case Work or click the Case Work hot button Work. This will open the Create Case Work page.
- 2. On the Create Case Work page, select AA Amended Agreement from the Agreements/Notices drop-down. Select the appropriate case and the appropriate case participant. Click the Create button. This will open the AA Amended Agreement page.



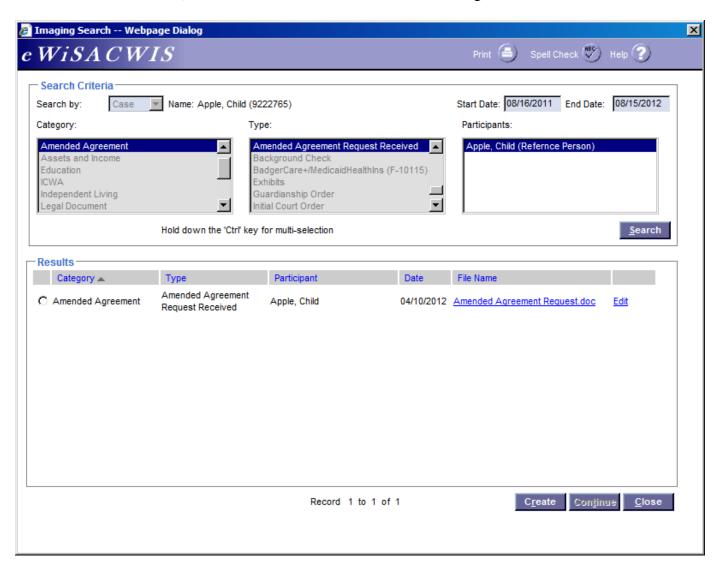
- 3. On the AA Amended Agreement page, use the Documentation group box to create and retrieve documents that are needed as part of the amendment process. Each of the options in the Type drop-down corresponds to either an image that can be scanned in to the system using the Imaging page (see the Imaging Quick Reference Guide) or a template that can be created.
- 4. Select 'Amended Agreement Request Received' from the Type drop-down in the Documentation group box. Selecting this option will display an <a href="Imaging Search">Imaging Search</a> hyperlink beside the row. Click the <a href="Imaging Search">Imaging Search</a> hyperlink to launch the Imaging Search data retrieval page.

**Note:** This Type (Amended Agreement Request Received) is required in order to approve the AA Amended Agreement.

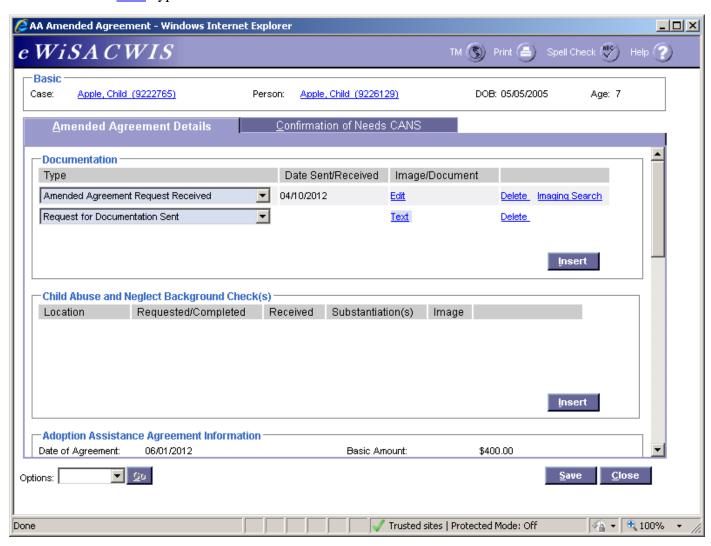


- 5. When the Imaging Search page is launched from the AA Amended Agreement page, the Category defaults to 'Amended Agreement,' the Type defaults to the option selected for the documentation row, and the Participants defaults to the name of the child on the amended agreement record. eWiSACWIS will automatically search for all imaging records of the Type selected from today's date to a year prior. These dates can be modified to further narrow the search.
- 6. If the Results group box has returned the image needed for the amended agreement, select the radio button next to the row then click the Continue button.

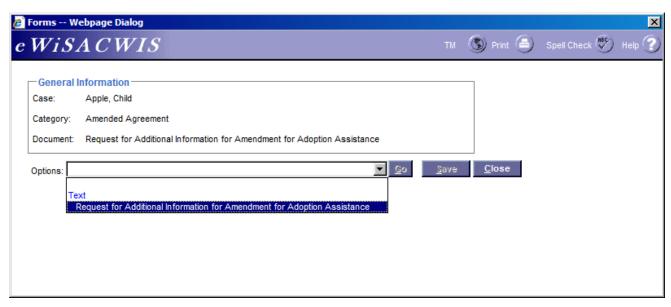
**Note:** If the Results group box does not display the necessary document based on the search criteria, a new image can be created by clicking the Create button. Clicking the Create button will launch the Imaging page (see the Imaging Quick Reference Guide). Once an image has been created and saved it will automatically display on the Imaging Search page (as long as the Date is within the Start Date and the End Date) and can be selected to link to the amended agreement record.



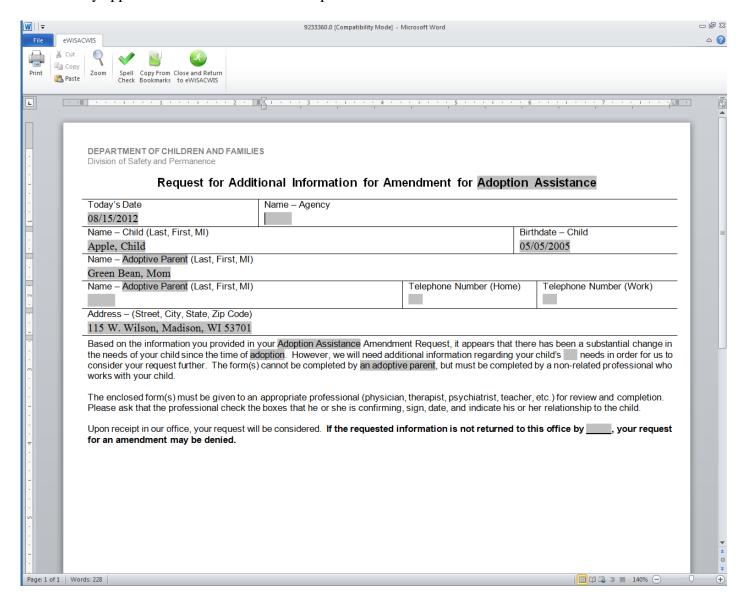
7. To create a template for the amended agreement, select 'Request for Documentation Sent,' 'Notice of Approval and Amended Agreement Sent,' or 'Notice of Denial Sent' from the Type drop-down. Selecting one of these options will display a <u>Text</u> hyperlink in the row. To access the template, click the Save button. Then click the <u>Text</u> hyperlink.



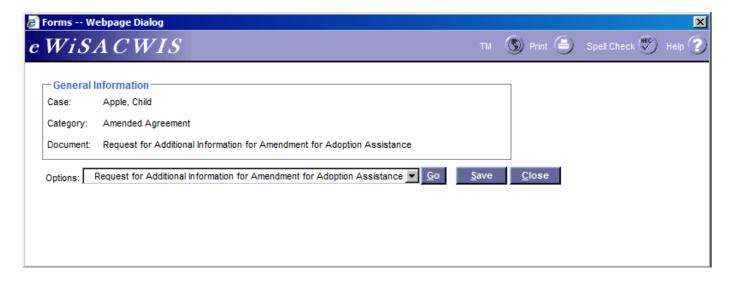
8. On the Forms page, select the associated document from the Options drop-down and click Go.



9. Enter any applicable information on the template and click the Close and Return to eWiSACWIS button.

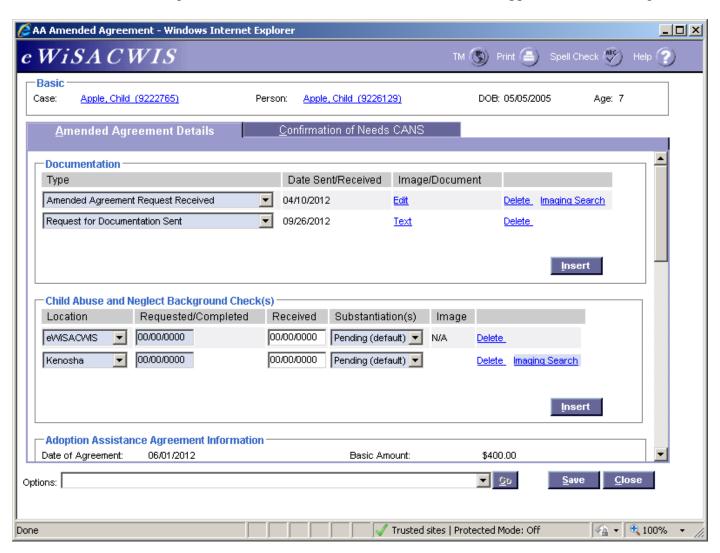


10. On the Forms page, click the Save and Close buttons.



- 11. The Date Sent/Received is now documented for the associated template.
- 12. Click the Insert button as needed to create additional documentation rows.
- 13. To associate a child abuse and neglect background check to the amended agreement, click the Insert button in the Child Abuse and Neglect Background Check(s) group box. Select an option from the Location field. If the eWiSACWIS option is chosen, document the Requested/Completed and Received dates and the Substantiation(s) field. If a county option is selected, an image is required to be linked and an <a href="Imaging Search">Imaging Search</a> hyperlink will be displayed. Click the <a href="Imaging Search">Imaging Search</a> hyperlink to launch the Imaging Search data retrieval page.

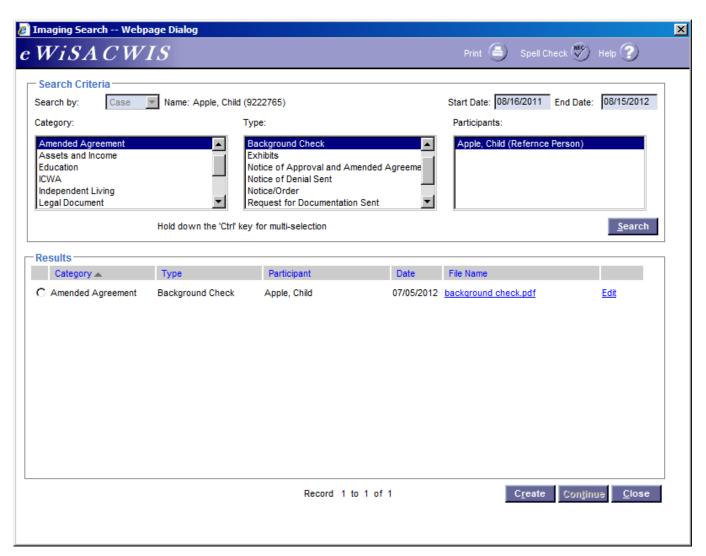
**Note:** At least one background check row must be documented in order to approve an amended agreement.



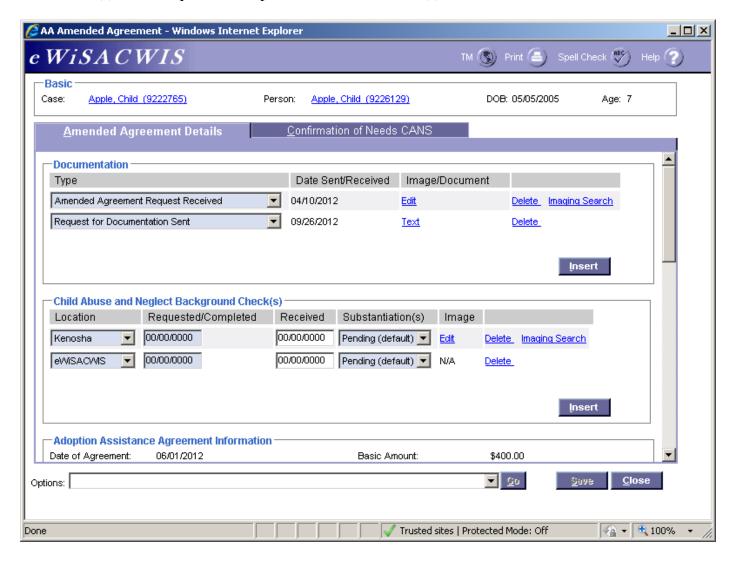
- 14. When the Imaging Search page is launched from the AA Amended Agreement page, the Category defaults to 'Amended Agreement,' the Type defaults to Background Check, and the Participants defaults to the name of the child on the amended agreement record. eWiSACWIS will automatically search for all imaging records of the Type selected from today's date to a year prior. These dates can be modified to further narrow the search.
- 15. If the Results group box has returned the image needed for the amended agreement, select the radio button next to the row then click the Continue button.

**Note:** If the Results group box does not display the necessary document based on the search criteria, a new image can be created by clicking the Create button. Clicking the Create button will launch the Imaging page (see the Imaging Quick Reference Guide). Once an image has been created and saved it will automatically display on the Imaging Search page (as long as the Date is within the Start Date and the End Date) and can be selected to link to the amended agreement record.

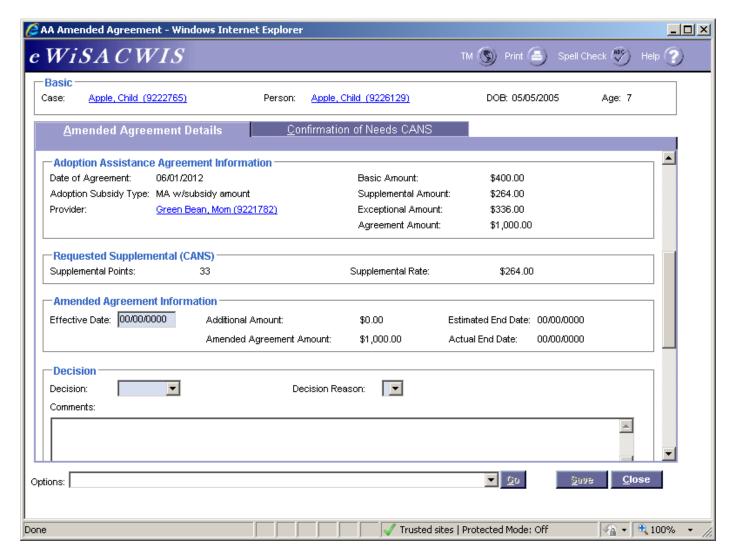
16. Once the search result needed is listed, click the radio button beside the row then click the Continue button.



- 17. Once the image has been linked to the amended agreement, an <u>Edit</u> hyperlink will display in the row. Clicking the <u>Edit</u> hyperlink will launch the Imaging record.
- 18. Enter date(s) in the Requested/Completed and Received field(s).

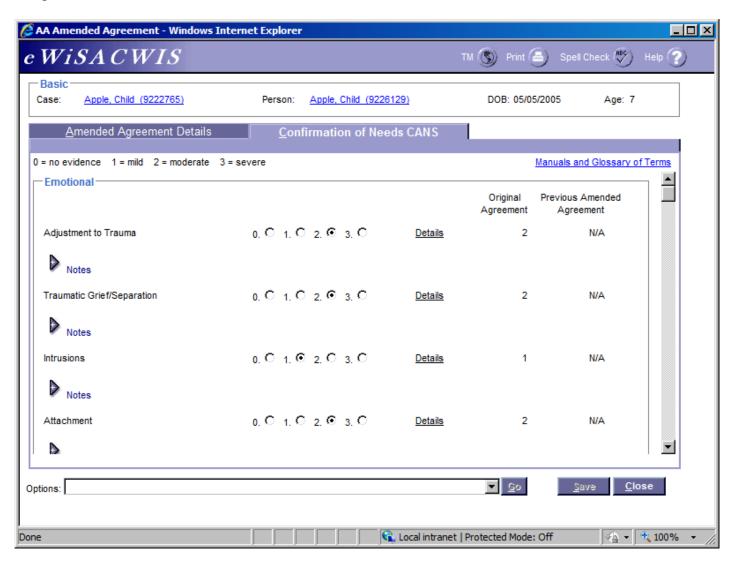


- 19. The Adoption Assistance Agreement Information group box displays data from the original Adoption Assistance Agreement: Date of Agreement, Basic Amount (comes from the Child Basic Rate field), Supplemental Amount (from the Child Specific Rate field), Exceptional Amount, and Agreement Amount.
  - Note: If Adoption Subsidy Type = MA only at risk or MA only not at risk, the Basic Amount field will be enabled and can be updated by the user. The new dollar value entered in the Basic Amount field by the user will then be factored into calculating the Amended Agreement Amount.

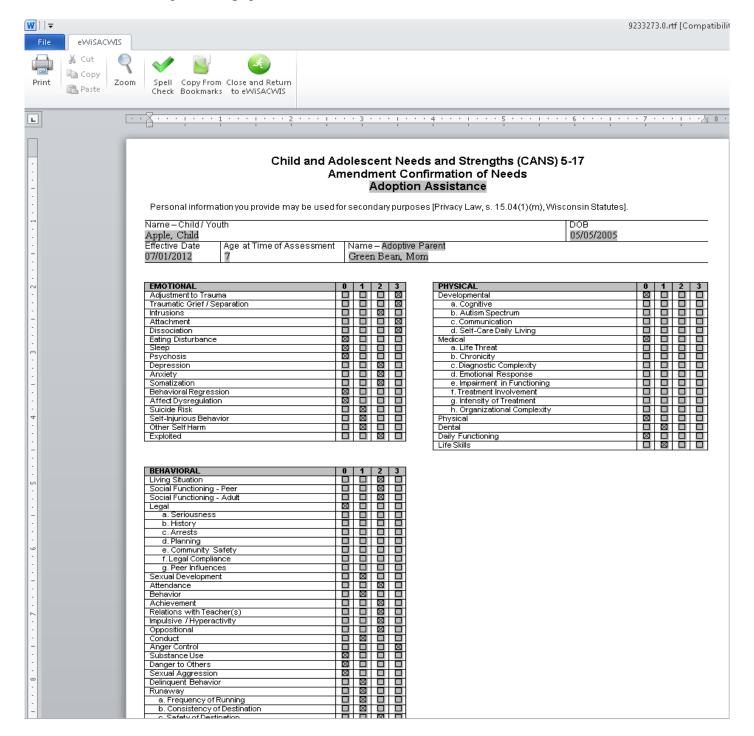


- 20. When an AA Amended Agreement is created, the Supplemental Points and Supplement Rate fields pre-fill from the original Adoption Assistance Agreement. The Amended Agreement Amount will initially default to the original Agreement Amount. The new Supplemental Points and Supplemental Rate needed for the amended agreement will be determined when ratings selections on the Confirmation of Needs CANS tab have been modified. Upon clicking the Save button, the system will automatically calculate the new supplemental points and rate and add this to the Agreement Amount to determine the new Amended Agreement Amount.
- 21. Enter a date in the Effective Date field.
- 22. Click the Confirmation of Needs CANS tab.

- 23. The items on the Confirmation of Needs CANS tab pre-fill the ratings that are relevant in determing the new supplemental rate for Adoption Assistance and are in the appropriate birth to 5 or 5 to 17 age range for the child as of the date the amended agreement request was received. Update the rating for each applicable item.
  - **Note:** On the initial amended agreement record, the agreement ratings will be pre-filled to the tab and display the option of that rating in the Original Agreement column (the Previous Amended Agreement column will default to 'N/A' for each rating item). On subsequent amended agreements the ratings will pre-fill from the most recent amended agreement and the options in the Previous Amended Agreement column will reflect the ratings from that amended agreement record.
- 24. Launch the Child and Adolescent Needs and Strengths (CANS) template by selecting the text from the Options field then click the Go button.

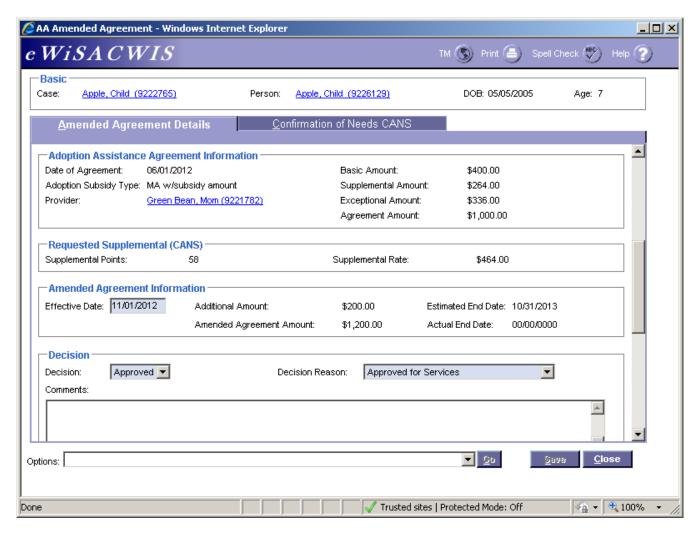


25. Click the Print button to print the template. Click the Close and Return to eWiSACWIS button to return to the AA Amended Agreement page.



- 26. In order to see the updated rate on the Amended Agreement Details tab, click the Save button.
- 27. Click the Amended Agreement Details tab and verify the Supplemental Points and Supplemental Rate.

- 28. Select the appropriate option from the Decision and Decision Reason fields. Enter narrative text in the Comments field if needed.
- 29. To approve the AA Amended Agreement, select Approval from the Options drop-down and click Go. On the Approval History page, select the Approve radio button then click the Continue button. To complete the approval, click the Save button on the AA Amended Agreement page.



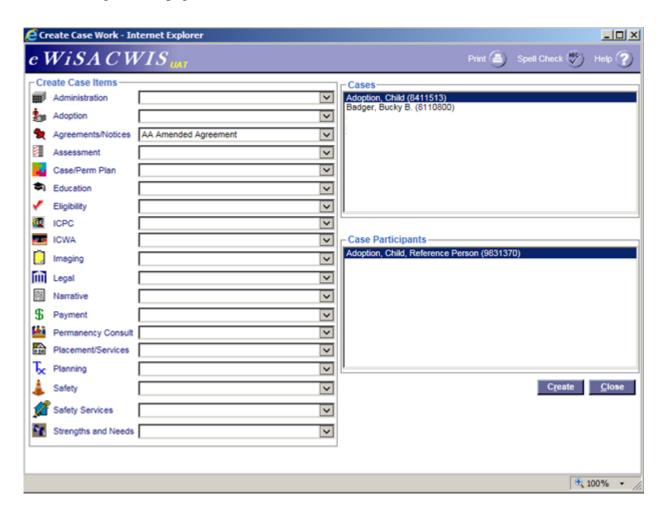
- 30. When the AA Amended Agreement receives final approval the page will become read only. The <u>Edit</u> and <u>Text</u> hyperlinks will change to <u>View</u> hyperlinks.
- 31. The Child Specific Rate for the AAFC Adoptive Home Service will automatically update with the new Amended Agreement Amount. The Effective Date is the month and year in which the new payment rate will begin to be generated for the Service. The rate is always a monthly rate.

32. A link to the AA Amended Agreement will display under the case outliner.



## Creating a Pre-CANS Adoption Assistance Amended Agreement

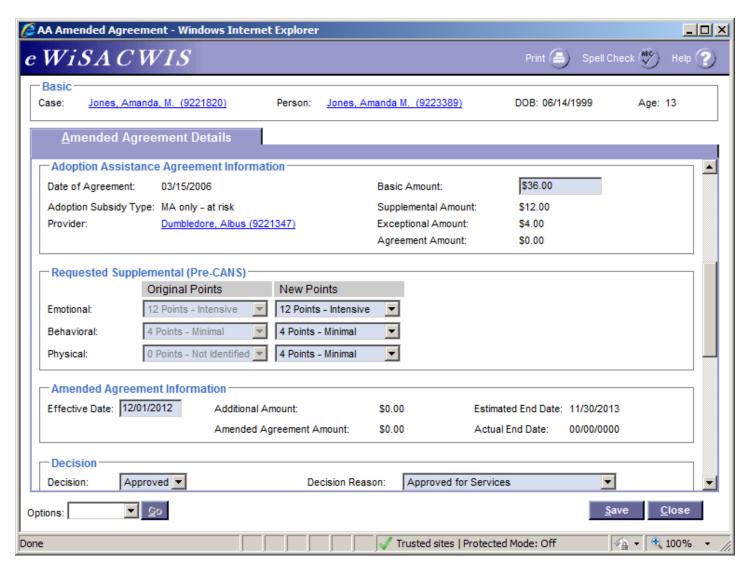
- 1. From the desktop, go up to Create > Case Work or click the Case Work hot button work. This will open the Create Case Work page.
- 2. On the Create Case Work page, select AA Amended Agreement from the Agreements/Notices drop-down. Select the appropriate case and the appropriate case participant. Click the Create button. This will open the AA Amended Agreement page.



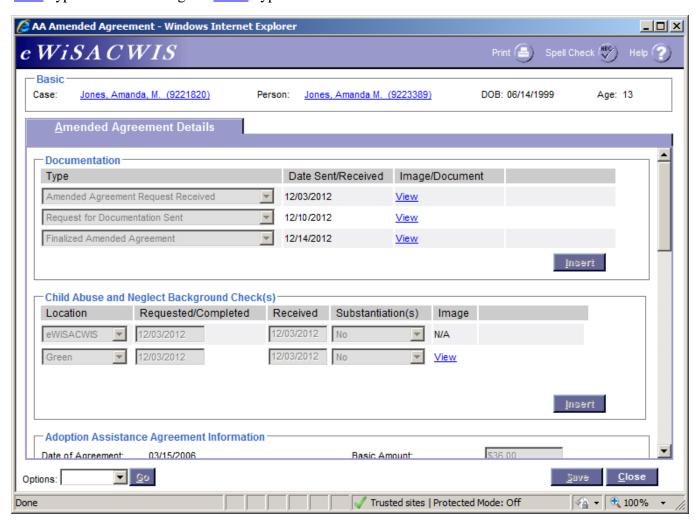
3. On the AA Amended Agreement page, complete the steps above for creating an AA Amended Agreement. For a pre-CANS AA Amended Agreement, the Confirmation of Needs CANS tab does not appear. Instead, the supplemental rate is determined by the Emotional, Behavioral, and Physical points. Select a value from the Emotional, Behavioral, and Physical fields under the New Points column. Once the Save button is clicked, the Amended Agreement Amount and the Additional Amount fields will update.

**Note:** If Adoption Subsidy Type = MA only – at risk or MA only – not at risk, the Basic Amount field will be enabled and can be updated. The updated Basic Amount will then be factored into calculating the Amended Agreement Amount.

- 4. Enter a date in the Effective Date field and select the appropriate Decision and Decision Reason.
- 5. To approve the AA Amended Agreement, select Approval from the Options drop-down and click Go. On the Approval History page, select the Approve radio button then click the Continue button. To complete the approval, click the Save button on the AA Amended Agreement page.



6. When the AA Amended Agreement receives final approval the page will become read only. The <u>Edit</u> and <u>Text</u> hyperlinks will change to <u>View</u> hyperlinks.



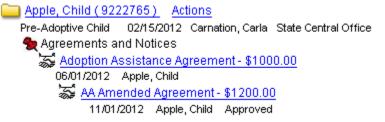
- 7. The Child Specific Rate for the AAFC Adoptive Home Service will automatically update with the new Amended Agreement Amount. The Effective Date is the month and year in which the new payment rate will begin to be generated for the Service. The rate is always a monthly rate.
- 8. A link to the AA Amended Agreement will display under the case outliner.



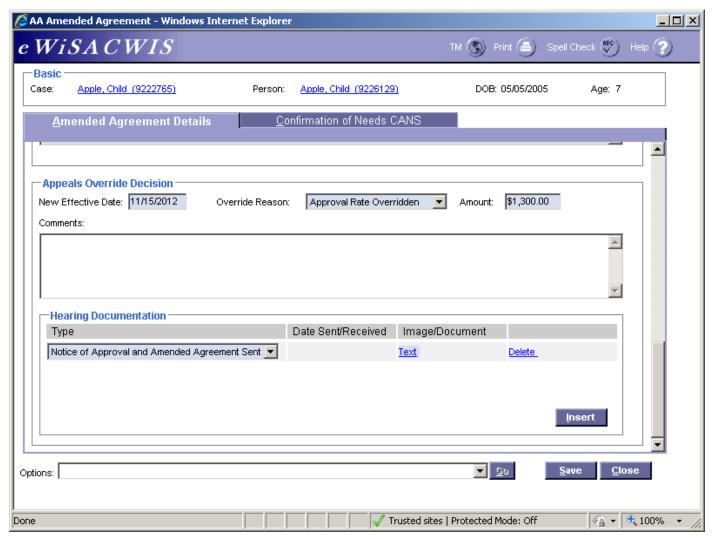
## **Documenting an Amended Agreement Override**

When an amended agreement has been approved, the effective date and amended agreement amount can be overridden when the option in the Decision field displays as 'Approved.'

1. To document the override first access the approved amended agreement from under the case outliner.



2. Scroll to the bottom of the AA Amended Agreement page and expand the Appeals Override Decision section.



- 3. Enter a date in the New Effective Date field.
- 4. Select an option from the Override Reason drop-down.

**Note:** An appeals override decision can be documented for a denied amended agreement. In theses cases, select Denial Overriden-Approved. The Amount field will be disabled as the system does not update the child specific rate for denied records. When an denied amended agreement is overridden using the appeals override decision, the system will allow you to create a subsequent amended agreement without having to wait a year from the effective date.

- 5. Enter a value in the Amount field.
- 6. Click the Insert button to insert a row in the Hearing Documentation group box. If the documentation is attaching a document, click the <u>Imaging Search</u> hyperlink and retrieve the associated document from the Imaging Search page (described earlier in this guide). If the documentation is creating a template, click the Save button. Click the <u>Text</u> hyperlink to launch the template. The Forms page will launch and the template can be created from the Forms page (described earlier in this guide). Save and close the Forms page after the template has been launched. Once the Forms page is closed the system will generate the Date Sent/Received.
- 7. If other images related to the appeals override decision need to be scanned and linked to the amended agreement, additional rows can be added to the Hearing Documentation group box as needed.
- 8. Click the Save button. Upon save the system will freeze the fields in the Appeals Override Decision group box. The system will update the Rate History page for the AAFC Adoptive Home Service with the new rate based on the updated Amount entered for the appeals override decision.